

APPENDIX 9-1

WDTIP Help Desk Operations and Procedures Guide

WDTIP HELP DESK OPERATIONS AND PROCEDURES GUIDE

SECTION I

HELP DESK OPERATIONS AND PROCEDURES DEFINITIONS

HELP DESK OPERATIONS AND PROCEDURES DEFINITIONS

The **Table 1-1: Help Desk Definitions** below, provides definitions of potentially unfamiliar terms and phrases used throughout this Guide.

Table 1-1: Help Desk Definitions

Term	Definition
Change Request	Request to change or enhance the WDTIP system.
County Help Desk (CHD)	Level I support – The CHD provides formal user support and escalates unresolved problems to the WDTIP Help Desk. CHD will be used throughout this Guide to refer to both county Help Desks and County HD resources.
County HD Resource	Level I support – The CHD provides formal user support and escalates unresolved problems to the WDTIP Help Desk. Designation of this resource(s) generally means the county does not have an existing Help Desk.
Configuration Item Change Request Form	Required form used to submit a change request.
Hardware/Network Problem	Origin of a problem is hardware or connectivity.
Help Desk Ticket	Standard form completed with appropriate information and submitted for problem reporting.
California Health and Human Services Agency Data Center (HHSDC)	Level III support – The HHSDC Help Desk provides network and hardware support to the WDTIP Help Desk.
Problem	System problem or user query referred for user support and can be resolved by either Level I, II or III assistance.
Level I Support	County Help Desk or county designated resource
Level II Support	WDTIP Help Desk
Level III Support	California Health and Human Services Agency Data Center Help Desk
Normal Priority	Priority assigned to a problem based upon pre-determined criteria that designates the level of problem severity.

Term	Definition
Remedy	WDTIP Help Desk problem tracking and management software.
Response Time	The amount of time from when a problem or change request is reported or submitted to when it is addressed.
Rush Priority	Priority assigned to a problem based upon pre-determined criteria that designates the level of problem severity
Stage I Troubleshooting	Initial problem analysis completed by WDTIP HD
Stage II Troubleshooting	Secondary problem analysis completed by WDTIP Application Team
Support Type	Method by which a Help Desk is contacted
System-Related problem	Origin of a problem is WDTIP design or functionality
WDTIP Toll Free Number	Long distance WDTIP Help Desk toll free phone line
WDTIP Help Desk (WHD)	Level II support – The WDTIP Help Desk provides support to counties' Help Desk resources.

SECTION II

HELP DESK

STRUCTURE OVERVIEW

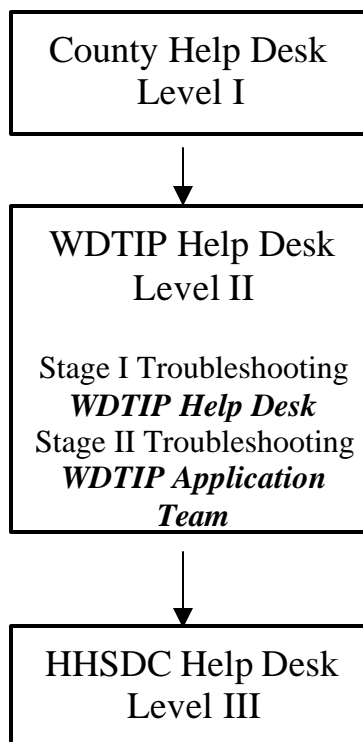
HELP DESK STRUCTURE OVERVIEW

The Help Desk structure used for the WDTIP is organized into three levels of support. The county Help Desk (CHD) is Level I User Support, the WDTIP Help Desk (WHD) is Level II User Support, and the HHSDC Help Desk is Level III User Support.

Level I support is the first stop for problem resolution. **Level II support** is considered an escalation and may be necessary if a problem cannot be resolved at Level I support. **Level III support** is provided for hardware, network or connectivity problems and like escalation to any level, it indicates a problem could not be resolved at the preceding level.

The figure below provides an overview of the WDTIP Help Desk structure and support levels.

Figure 2-1: Help Desk Support Levels



SECTION III

COUNTY HELP DESK LEVEL I

OPERATIONS AND PROCEDURES

COUNTY HELP DESK (~~CHD~~) LEVEL I OPERATIONS OVERVIEW

It is the county's responsibility to provide on site support for county users. The recommendations in the ~~county Help Desk (CHD)~~ procedures below are written only as a general guide for counties interested in establishing formal Help Desk procedures. However, when a CHD makes the decision that Level II Help Desk support is required, the county's escalation procedures are based upon those set by the ~~WDTIP Help Desk (WHD)~~. The specific county procedures for referring a problem to the WHD are included in this section.

Daily Operations

County Help Desk Problem Analysis and Resolution

The CHD is responsible for analyzing all problems reported by county users and assisting users in obtaining resolutions. Not every issue requires the same effort to resolve, or has the same priority level. For this reason, it is necessary that the CHD develop a procedure to ensure that each reported problem receives the proper amount of attention within a reasonable timeframe. This will ensure that problems are forwarded on to the CHD or to the WHD, when required. The following are suggested steps in this procedure:

- ❑ **Contacting the County Help Desk** – The CHD should establish procedures for all contact to the CHD. These procedures should include who is authorized to access the CHD, how to contact the Help Desk and the types of problems that should be reported to the CHD.
- ❑ **Conducting Initial Reviews and Analysis** – All problems should receive an initial review at the CHD Level I support. This allows the CHD to determine the nature of the call and whether it will be difficult to resolve. At this time, the CHD should prioritize the issue. This will ensure that the most critical problems, such as those that have the potential of requiring phone calls to other counties for clarification, are given top priority. This initial review and analysis also allows the CHD to separate those problems that can be easily resolved from those that may require more research to resolve.
- ❑ **Establishing the Level of problem Severity** – The CHD assigns a severity level to each problem following an initial review. Severity levels are defined as either “Rush” or “Normal.”
 - **Rush** – This priority requires a call from the CHD to the WHD. This severity level is serious and indicates immediate attention is required, usually because county staff is waiting. For example, users cannot access the WDTIP system. This problem is usually hardware or network related.

- **Normal** – This priority requires a call, fax, e-mail or mail from the CHD to the WHD. This severity level indicates “any other problem” with or without a deadline date and is usually regarding the data viewed on the screens, questions regarding the WDTIP report files or general questions regarding the WDTIP system.
- ❑ **Problem Resolution Procedures** – In addition to the procedures for analyzing and researching user problems, the CHD should develop procedures for resolving problems and notifying the appropriate county staff when the resolution has been determined. With established procedures in place, the system users will receive prompt notification that their problems are resolved. The mechanism selected will also be used by the CHD to contact system users upon notification by the WHD of system changes, procedures or enhancements to the WDTIP system.

Daily Operations

Help Desk ~~P~~problem Escalation Procedures

The CHD will serve as the escalation point for referring unresolved problems reported by county users to WHD, Level II support. Escalating a problem to the WHD is the decision of the county. The CHD should establish these escalation procedures at the time of establishing their Help Desk guidelines. However, the CHD is required to follow specific procedures (detailed in the **Table 3-1: Help Desk problem Escalation Procedures**) on the following page when the decision has been made to escalate the problem.

Table 3-1: Help Desk problem Escalation Procedures

If	Priority	Type	Then
CHD unable to resolve	<i>Rush</i>	Phone	Priority Rush – CHD will call WHD immediately. CHD will provide the following: <ul style="list-style-type: none"> ▪ County Resource Name ▪ County Resource Phone Number ▪ County Name ▪ Description of problem ▪ Case Number ▪ CIN or SSN ▪ Error Message ▪ Expected Result
CHD unable to resolve	<i>Normal</i>	Phone	Priority Normal – CHD will call WHD. CHD will provide the following: <ul style="list-style-type: none"> ▪ County Resource Name ▪ County Resource Phone Number ▪ County Name ▪ Description of problem ▪ Case Number ▪ CIN or SSN ▪ Error Message ▪ Expected Result
CHD unable to resolve	<i>Normal</i>	Fax E-mail Mail	Priority Normal – CHD will complete the WHD Ticket and forward to WHD <i>Note: attach screen print to fax or mail</i>

WDTIP Help Desk Ticket – The WHD Ticket is used to forward problems to the WHD. The CHD is required to complete sections 1 through 5 before submitting the ticket. The **Table 3-2: Required Help Desk Ticket Information** below describes the information required for each field. See **Appendix 9-3** for a sample of the **WDTIP Help Desk Problem Ticket**.

It will also be helpful for the WDTIP Help Desk to have a screen print of the screen results in question. This will assist the analysts in easily accessing and re-creating the problem scenario.

Table 3-2: Required Help Desk Ticket Information

Field	Provider	Description
CHD Resource	County	Name of the person submitting the problem
Phone Number	County	Phone number to reach the county resource
Fax Number	County	Fax number to reach the county resource
County Name	County	Name of submitting county
County Number	County	Number of submitting county
E-mail Address	County	E-mail address to reach county
Problem Category	County	Describe priority level and suspected problem category
Date Needed By	County	Complete if solution is required within a specific timeframe
Record Identification Information	County	Complete with all pertinent information
Complete if problem is a WDTIP System screen	County	Determine what screen was being accessed when the problem occurred
Describe Problem	County	Detailed description of the problem
WHD Comments	Help Desk	Describe in as many details as possible, the problem and what steps have to been taken to resolve
Date of resolution from WHD or Application Team	Help Desk	Marks the date the issue was resolved by the WHD or WDTIP Application Team
Resolution	Help Desk	Steps or fixes which solve the original problem

Field	Provider	Description
Date Resolution Returned to CHD	Help Desk	Marks the date the solution was passed to the originating CHD resource
Date Problem Closed	Help Desk	Marks the date the county implemented the resolution
Date Problem Re-opened	Help Desk	Marks the date the problem resolution was returned from the county
WHD Resource	Help Desk	Assigned Help Desk resource

Daily Operations

Help Desk ~~P~~problem Re-submit Procedures

The CHD will re-submit problems to WHD, Level II support if the solution provided by the WHD has not resolved a previously closed problem. Re-submitting the problem to the WHD is the decision of the county. However, the CHD is required to follow the specific procedures below when that decision has been made. **Table 3-3: Help Desk problem Re-submit Procedures** below outlines these procedures.

Table 3-3: Help Desk problem Re-submit Procedures

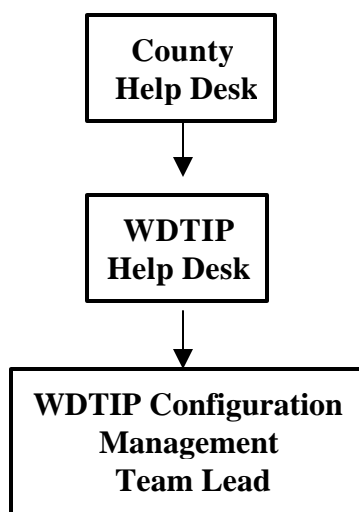
If	Priority	Type	Then
CHD determines resolution incorrect	Rush	Phone	Priority Rush – CHD will call WHD immediately and re-submit the ticket. CHD will provide the following: <ul style="list-style-type: none"> County Resource Name Remedy Ticket ID Number Reason for Re-submitting problem Steps Taken Expected Result
CHD determines resolution incorrect	Normal	Phone	Priority Normal – CHD will call WHD and re-submit the ticket. CHD will provide the following: <ul style="list-style-type: none"> County Resource Name Remedy Ticket ID Number Reason for Re-submitting problem Steps Taken Expected Result

Help Desk Change Request Referral Overview

The ~~county Help Desk (CHD)~~ should establish their specific county change request procedures at the time of establishing their Help Desk guidelines. The CHD can request a system change by submitting the *WDTIP Configuration Item Change Request Form* to the WDTIP Help Desk. *Appendix 10-1* includes a sample of the *Configuration Item Change Request Form*.

Once a change request has been submitted by the CHD to the WHD, the request follows a configuration control process that is detailed in the WDTIP **Configuration Plan** deliverable. *Figure 3-1: Change Request Referral Overview* below provides an overview of the initial steps of the change request flow.

Figure 3-1: Change Request Referral Overview



Daily Operations

Help Desk Change Request Procedures Overview

The CHD is responsible for submitting all change problems requested by their county to the WHD. Not every change request requires the same effort to complete or validate. For this reason, it is necessary that the CHD develop a procedure to ensure that each change request submitted to the WHD receives the proper amount of attention and provides the required information with any necessary supporting documentation. This will ensure that change requests forwarded on to the CHD or to the WHD, are completed with a certain level of consistency. The following are suggested steps in this procedure:

- ❑ **Contacting the County Help Desk** – The CHD should establish procedures for all change request referrals to the Help Desk. They should include who is authorized to complete a change request, how to complete a change request, how to submit a request to the CHD and the types of change requests that should be referred to the CHD.
- ❑ **Conducting Initial Reviews and Analysis** – All change requests should receive an initial review at the CHD. This allows the CHD to validate the accuracy of the request, determine the completeness of the form, request supporting documentation and additional information and check for existing parallel requests.
- ❑ **Establishing the Level of Severity** – At this time, the CHD should provide a high-level impact analysis of the change request. This will ensure that the most critical requests, such as those that have the potential of affecting the largest number of end users (i.e., time clock calculation or report function) are distinguished when received by the WHD.
- ❑ **Documenting and Tracking Procedures** – In addition to the procedures for reviewing, analyzing and researching change requests, the CHD should develop procedures for documenting and tracking change requests and notifying the appropriate people when the change request has been submitted. With established procedures in place, the submitters will receive prompt notification that their change request has been submitted.

Daily Operations

Help Desk Change Request Procedures

The CHD will serve as the referral point for change requests submitted by the county to WHD. The CHD should establish the change request referral procedures at the time of establishing their Help Desk guidelines. Referring a change request to the WHD is the decision of the county. However, the CHD is required to follow the procedures outlined in **Table 3-4: Help Desk Change Request Procedures** below when the decision has been made to refer the change request.

Table 3-4: Help Desk Change Request Procedures

If	Then
CHD receives change request	CHD forwards change request fax, e-mail or mail to WHD.

SECTION IV

WDTIP HELP DESK LEVEL II

OPERATIONS AND PROCEDURES

WDTIP ~~(WHD)~~ HELP DESK LEVEL II OPERATIONS AND PROCEDURES

OVERVIEW

The WHD is required to assist system users in resolving problems with the WDTIP system and answering questions regarding the use of the WDTIP system. The WHD is required to communicate WDTIP system-related and project procedures, where appropriate and is responsible for logging, analyzing, documenting and responding to problems and questions identified by users. The WHD is also required to escalate a problem to the appropriate levels of support.

WDTIP Help Desk Levels of Support

The WHD provides Level II support to the CHD. The WHD may contact the WDTIP Application Support Team if a problem cannot be resolved. The WHD contacts the California Health and Human Services Agency Data Center (HHSDC) Help Desk Level III support when a problem cannot be resolved locally and is determined to be a hardware or network problem.

WDTIP Help Desk Staff Levels

The WHD is staffed with a minimum of one analyst with a backup resource available as needed.

WDTIP Help Desk Service Level Guidelines

The WHD prioritizes all problems submitted by phone, fax, e-mail or mail from the CHD. The WHD determines the appropriate level of support required to solve the problem based upon the information provided by the CHD. The WHD sets the service guidelines for problem response for contacts as follows:

- ❑ **Rush** – This contact is serious and requires immediate attention, usually because county staff is waiting. This priority will generally be a hardware, network or connectivity problem. This priority requires a call from the CHD to the WHD and requires that the WHD log the contact into Remedy immediately.
- ❑ **Normal** – This contact indicates “any other problem” with or without a deadline date. This contact indicates a problem noticed by the user during review of the inquiry or update screens, a question regarding the data viewed on the screens or questions regarding the WDTIP report files. This priority requires a call, fax, e-mail or mail from the CHD to the WHD and requires that the WHD log the contact into Remedy.

Daily Operations

Help Desk ~~P~~problem and Escalation Procedures

The WHD is required to follow the procedures outlined in *Table 4-1: Help Desk problem and Escalation Procedures (Rush - System Related)* below when a problem prioritized as “*Rush*” has been received from the CHD and determined to be system related.

**Table 4-1: Help Desk problem and Escalation Procedures
(Rush - System Related)**

If	Support Type	Action
Priority Rush	Phone	Step 1 WHD Confirms Priority Step 2 WHD opens problem ticket in Remedy Step 3 WHD conducts Stage I troubleshooting Step 4 WHD determines system-related problem
If	Then	
Resolve Yes	<ul style="list-style-type: none"> WHD provides resolution to CHD WHD provides Remedy ticket ID Number WHD updates Remedy ticket with resolution WHD closes Remedy ticket 	
If	Action	Then
Resolve No	<ul style="list-style-type: none"> Step 1 Help Desk determines problem is system-related and Stage II Troubleshooting required Step 2 Help Desk updates status of ticket in Remedy Step 3 WHD calls CHD and provides Remedy ticket ID number 	Escalate Rush – WHD <i>calls</i> WDTIP Application Team immediately for Stage II troubleshooting and provides the following: <ul style="list-style-type: none"> WHD Analyst Name WHD Analyst Phone Number Remedy ticket ID Number Description of problem Error Message Expected Result

Daily Operations

Help Desk ~~P~~problem and Escalation Procedures

The WHD is required to follow the specific procedures outlined in *Table 4-2: Help Desk problem Escalation Procedures (Rush - Hardware/Network Related)* when a problem prioritized as “*Rush*” has been received from the CHD and determined to be hardware or network related.

Table 4-2: Help Desk problem Escalation Procedures (Rush Hardware/Network Related)

If	Support Type	Action
Priority Rush	Phone	Step 1 WHD confirms priority Step 2 WHD opens problem ticket in Remedy Step 3 WHD conducts Stage I troubleshooting Step 4 WHD determines hardware/network related problem
If	Then	
Resolve Yes	<ul style="list-style-type: none"> WHD provides resolution to CHD WHD provides Remedy ticket ID Number WHD updates Remedy with resolution WHD closes Remedy ticket 	
If	Action	Then

Resolve No	<ul style="list-style-type: none"> Step 1 WHD determines problem is <i>hardware or network</i> related and Level III Troubleshooting required Step 2 WHD updates status of ticket in Remedy Step 3 WHD calls CHD and provides Remedy ticket ID number 	<p>Escalate Rush – WHD calls HHSDC Help Desk for Level III support immediately and provides the following:</p> <ul style="list-style-type: none"> WHD Analyst Name WHD Analyst Phone Number Remedy ticket ID Number Description of problem Error Message Expected Result
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Daily Operations

Help Desk ~~P~~problem and Escalation Procedures

The WHD is required to follow the procedures outlined in *Table 4-3: Help Desk problem and Escalation Procedures (Normal)* when a problem prioritized as “Normal” has been received from the CHD.

**Table 4-3: Help Desk problem Escalation Procedures
(Normal – Phone)**

If	Support Type	Action
Normal	Phone	Step 1 WHD documents contact in Phone Log Step 2 WHD confirms priority Step 3 WHD conducts Stage I troubleshooting
If	Then	
Resolve Yes	WHD provides resolution to CHD	
If	Action	Then
Resolve No	Step 1 WHD determines additional analysis is required Step 2 WHD e-mails CHD and provides Remedy ticket ID number	Priority Normal – WHD opens problem ticket in Remedy. WHD will complete the following: <ul style="list-style-type: none"> County Resource Name County Resource Phone Number County Name WHD Analyst Name WHD Analyst Phone Number County Name Required Help Desk ticket information Description of problem Expected Result
If	Action	Then

Resolve No	Step 1 WHD determines Stage II troubleshooting is required Step 2 WHD updates status of ticket in Remedy	Escalate Normal – WHD forwards to WDTIP Application Support Team for Stage II troubleshooting and provides the following <ul style="list-style-type: none">▪ WHD Analyst Name▪ WHD Analyst Phone Number▪ Remedy ticket ID Number▪ Description of problem▪ Error Message▪ Expected Result
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Daily Operations

Help Desk ~~P~~problem and Escalation Procedures

The WHD is required to follow the specific procedures in *Table 4-4: Help Desk problem and Escalation Procedures (Normal – Fax, E-mail, Mail)* when a problem prioritized as “*Normal*” has been received from the CHD.

**Table 4-4: Help Desk problem and Escalation Procedures
(Normal – Fax, E-mail, Mail)**

If	Type	Action
Normal	Fax E-mail Mail	Step 1 WHD confirms Priority Step 2 WHD opens problem ticket in Remedy Step 3 WHD conducts Stage I troubleshooting
If	Then	
Resolve Yes	<ul style="list-style-type: none"> WHD notifies CHD of resolution WHD provides CHD with Remedy ID number WHD updates Remedy ticket with resolution WHD closes Remedy ticket 	
If	Action	Then
Resolve No	<ul style="list-style-type: none"> Step 1 Notify CHD ticket received Step 2 Provide CHD with Remedy ticket ID number Step 3 WHD determines problem is <i>system - related</i> and Stage II Troubleshooting required Step 4 WHD updates status of ticket in Remedy 	Escalate Normal – WHD refers to Application Support Team for Stage II troubleshooting WHD provides the following: <ul style="list-style-type: none"> WHD Analyst Name WHD Analyst Phone Number Required Help Desk ticket information Description of problem Expected Result

Daily Operations

Help Desk ~~P~~problem Resolution and Notification Procedures

The WHD is required to follow the specific procedures in *Table 4-5: Help Desk problem Resolution and Notification Procedures (Rush – Phone)* when a problem prioritized as “*Rush*” has been resolved.

Table 4-5: Help Desk problem Resolution and Notification Procedures (Rush – Phone)

If	Level	Type	Then
Resolve Yes	WHD Stage I Trouble- shooting	Phone	<ul style="list-style-type: none"> WHD enters resolution into Remedy WHD calls CHD to provide resolution WHD closes ticket in Remedy
Resolve Yes	WDTIP Application Team Stage II Trouble- shooting	Phone	<ul style="list-style-type: none"> Application Support Team enters resolution into Remedy Application Support Team calls WHD to advise ticket is resolved WHD confirms resolution and calls CHD to provide resolution WHD closes ticket in Remedy
Resolve Yes	HHSDC Help Desk Level III Trouble- shooting	Phone	<ul style="list-style-type: none"> HHSDC calls WHD to advise ticket has been resolved WHD enters resolution into Remedy WHD confirms resolution WHD calls CHD to provide <u>resolution</u> WHD closes ticket in Remedy

Daily Operations

Help Desk ~~P~~problem Resolution and Notification Procedures

The WHD is required to follow the specific procedures in *Table 4-6: Help Desk problem Resolution and Notification Procedures (Normal – Fax, E-mail, Mail)* when a problem prioritized as “Normal” has been resolved.

Table 4-6: Help Desk problem Resolution and Notification Procedures (Normal – Fax, E-mail, Mail)

If	Level	Type	Then
Resolve Yes	WHD Stage I Trouble- shooting	Fax E-mail Mail	<ul style="list-style-type: none"> WHD updates Remedy with resolution WHD closes ticket in Remedy WHD faxes/mails or e-mails updated WHD ticket with resolution to CHD
Resolve Yes	WDTIP Application Support Team Stage II Trouble- shooting	Fax E-mail Mail	<ul style="list-style-type: none"> Application Support Team updates Remedy with resolution WHD confirms resolution WHD closes ticket in Remedy WHD faxes/mails or e-mails updated WHD ticket with resolution to CHD

Daily Operations

Help Desk ~~P~~problem Re-submit Procedures

The WHD re-submits problems to either the WDTIP Application Support Team or the HHSDC Help Desk, Level III support if the solution provided by the Application Support Team or HHSDC Help Desk has not resolved a previously closed problem. The WHD analyst is required to follow the specific procedures in **Table 4-7: Help Desk problem Re-submit Procedures** when a Remedy ticket requires re-submitting.

Table 4-7: Help Desk problem Re-submit Procedures

If	Priority	Type	Then
WHD determines Resolution from <i>Application Support Team</i> is incorrect	Rush	Phone	Priority Rush – WHD will <i>call</i> WDTIP Application Support Team immediately and re-submit the ticket. WHD will provide the following: <ul style="list-style-type: none"> ▪ Remedy Ticket ID Number ▪ Reason for Re-submitting problem ▪ Steps Taken ▪ Expected Result
WHD determines resolution from <i>HHSDC Help Desk</i> is incorrect	Normal	Phone	Priority Normal – WHD will <i>call</i> HHSDC and re-submit the ticket. WHD will provide the following: <ul style="list-style-type: none"> ▪ WHD Analyst Name ▪ Remedy Ticket ID Number ▪ Reason for Re-submitting problem ▪ Steps Taken ▪ Expected Result

Daily Operations

Help Desk Support Type Response

The primary response time for each severity is the maximum amount of time the user should have to wait. These maximums are reasonable, given the WHD resources and the importance of the problem, and are designed to meet reasonable user and Project expectations.

- ❑ **Phone Contact Primary Response** – The WHD analyst monitors The WHD phone lines throughout the day.
- ❑ **Fax Primary Response** – The WHD analyst monitors the Help Desk fax mailbox throughout the day.
- ❑ **E-mail/Mail** – The WHD analyst monitors the Help Desk e-mail/mail throughout the day.

Specific response procedures are provided in *Table 4-8: Help Desk Support Type Response Procedures* below.

Table 4-8: Help Desk Support Type Response Procedures

Type	Response Maximums	Action	Then
Phone	Immediate delivery	Monitor throughout the work day	Immediate delivery
WHD Toll-Free Voicemail	Within 24 hours of receipt	Monitor throughout the work day	Return all voicemail messages received within 4 working hours. WHD Analyst is required to contact county and follow WHD problem Procedures

Type	Response Maximums	Action	Then
Individual WHD Voicemail	Within 24 hours of receipt	Monitor throughout the work day	Return all voicemail messages received within 4 four working hours. WHD Analyst is required to contact county and follow WHD problem Procedures
Forwarding Individual Line		Forward line to the WHD toll free number if analyst unavailable	Return all calls. WHD Analyst is required to contact county and follow WHD problem Procedures
Voicemail Messaging		Update individual Help Desk line voicemail if analyst unavailable for an extended period	Return all voicemail messages. WHD Analyst is required to contact county and follow WHD problem Procedures
Fax	Within 30 minutes of receipt of Fax	WHD analyst is required to check Outlook hourly	Within 30 minutes of receiving fax WHD Analyst is required to contact county and follow WHD problem Procedures
E-mail	Within 30 minutes of receipt of e-mail	WHD analyst is required to check Outlook hourly	Within 30 minutes of receiving e-mail WHD Analyst is required to contact county and follow WHD problem Procedures

Daily Operations

Help Desk Telephone Log Procedures

The WHD analyst is required to document all WDTIP system-related telephone contact with the CHD. This log is required to provide project management with statistical information regarding system usage, patterns or trends.

The telephone contact log will be completed by the Help Desk analyst upon receipt of any support related calls. A sample **Help Desk Telephone Contact Log** is included as **Attachment 9-A**.

The following information will be provided for each telephone contact:

- ☐ Name of the WHD analyst
- ☐ Name of the caller
- ☐ County
- ☐ Date of contact
- ☐ Time of contact
- ☐ Reason for call

Daily Operations

Help Desk Documentation Procedure

The WHD is required to follow the specific procedures in *Table 4-9: Help Desk Documentation Procedures* when developing, distributing and updating project documentation to counties.

Table 4-9: Help Desk Documentation Procedures

Document	WHD Creates	Web-site	Distribution Method			WHD Updates
			Down load	E-mail	Mail	
WHD Phone Directory	Yes	No	No	Yes	No	Yes
CHD Resource Directory	Yes	No	No	Yes	No	Yes
WHD Ticket Form stock	Yes	Yes	Yes	Yes	Yes	Yes
WDTIP User Guide	No	Yes	Yes	Yes	No	No
WDTIP Configuration Item Change Request Form	No	No	No	Yes	Yes	No
WDTIP Screen Help Information	No	Yes	Yes	Yes	No	No
WDTIP Field and Error Help Information	No	Yes	Yes	Yes	No	No
WDTIP External Developers Guide	No	Yes	Yes	Yes	No	No
WDTIP Business Data Dictionary	No	Yes	Yes	Yes	No	No
WDTIP Monthly Bulletin	Yes	Yes	Yes	Yes	Yes	Yes

Document	WHD Creates	Web-site	Distribution Method			WHD Updates
			Down load	E-mail	Mail	
WDTIP User Training Guide	No	Yes	Yes	Yes	No	No
WDTIP Training for Trainer Curriculum	No	Yes	Yes	Yes	No	No

Daily Operations

Help Desk Statistical Reporting Procedures

The WHD Analyst is responsible for developing monthly statistical reports and providing ad hoc reports regarding WHD performance tracking and system problem trends and patterns. The WHD publishes the monthly reports and provides them to the WDTIP management. The subject of each report is listed below.

The WHD Analyst reconciles the status of all Help Desk tickets monthly and provides this status report to the WDTIP management. The WHD Analyst is required to follow the procedure in **Table 4-10: Help Desk Statistical Reporting Procedures** when publishing ad hoc, reconciliation and standard monthly reports:

Table 4-10: Help Desk Statistical Reporting Procedures

Report Name	Report Subject	Frequency	Distribution	Distribution Method	
				Down load	E-mail
Reconciliation Report	Status of Remedy Tickets	Monthly	WDTIP Managers Team Leads	No	Yes
Client Contact	Support Type	Monthly	WDTIP Managers Team Leads	No	Yes
WDTIP Help Desk Performance	Response Maximums	Monthly	WDTIP Managers Team Leads	No	Yes
	Volume of problems	Monthly	WDTIP Managers Team Leads	No	Yes
System Performance	Application Incidents	Ad hoc	WDTIP Managers Team Leads	No	Yes
	Reports Incidents	Ad hoc	WDTIP Managers Team Leads	No	Yes
	Network Incidents	Ad hoc	WDTIP Managers Team Leads	No	Yes

Daily Operations

Help Desk Broadcast Notification Procedure

The WHD Analyst is required to notify the entire user community when a problem with the WDTIP system software has been corrected or system design has changed. Broadcast notification is also required for instances when project procedures with potential impact to counties, have changed.

Broadcast notification is also required in the event of scheduled or unscheduled downtime. In the instances where downtime is scheduled in advance, the WHD will contact the appropriate groups *prior* to the effect of that event. The WHD Analyst contacts these groups by phone, fax, bulletin *and/or* e-mail.

The method for providing notification is not specific to the event and is subject to the decision of Project managers and/or Team Leads. *All releases to counties are routed for prior approval via the existing project approval process.*

The WHD is required to follow the specific procedures in **Table 4-11: Help Desk Broadcast Notification Procedure** for any broadcast notifications.

Table 4-11: Help Desk Broadcast Notification Procedure

If	Then	Notification Method	Distribution
Unscheduled System Downtime	WHD Analyst notification	Phone	WDTIP Project Managers WDTIP Team Leads HHSDC Help Desk County Help Desk
Scheduled System Downtime	WHD Analyst notification	Phone Fax E-mail Monthly bulletin	WDTIP Project Managers County Directors WDTIP Team Leads HHSDC Help Desk County Help Desk
Correction or change to WDTIP System	WHD Analyst notification	E-mail Monthly bulletin	WDTIP Project Managers WDTIP Team Leads HHSDC Help Desk County Help Desk
Change in Project Procedure	WHD Analyst notification	Monthly bulletin	WDTIP Project Managers WDTIP Team Leads HHSDC Help Desk County Help Desk

Daily Operations

Help Desk Change Request Procedures

The WHD is required to enter change request information in the Access database. The WHD Analyst is required to follow the specific procedures outlined in **Table 4-12: Help Desk Change Request Procedures** when a *Configuration Item Change Request* form has been received from the CHD.

**Table 4-12: Help Desk Change Request Procedures
(using Change Request Form)**

If	Support Type	Then
<i>Configuration Item Change Request</i> form received from CHD	Fax E-mail Mail	WHD analyst enters information provided on <i>Configuration Item Change Request</i> form into the Access database <u>and contacts county to advise request has been submitted.</u>

**Table 4-13: Help Desk Change Request Procedures
(using Phone, Fax or E-Mail)**

If	Action
A problem is determined by WHD to be a change to existing system design or functionality	WHD enters change request in Access Issue and problem Tracking database. WHD analyst provides the following: <ul style="list-style-type: none"> Remedy ticket ID Number Remedy ticket information Required <i>Configuration Item Change Request</i> form information
Then	Action
WHD is required to phone, fax or e-mail CHD	WHD is required to advise CHD Remedy ticket has been submitted as a Change Request. WHD provides the following: <ul style="list-style-type: none"> Remedy ticket ID Number Access database issue number

Daily Operations

Help Desk Policy Referral Procedure

California Department of Social Services (CDSS) Policy

Questions and issues regarding welfare and welfare related policy and CDSS policy decisions are answered by CDSS. Help Desk tickets that require CDSS policy decisions are forwarded to CDSS.

If	Action	Then
WHD determines problem or question from CHD requires interpretation of CDSS policy	WHD Team Lead validates determination	WHD informs CHD policy interpretation or clarification is required and advises CHD to request policy clarification using established county procedures for contacting CDSS

SECTION V

HHSDC HELP DESK LEVEL III

OPERATIONS AND PROCEDURES

DAILY OPERATIONS

CALIFORNIA HEALTH AND HUMAN SERVICES AGENCY DATA CENTER ~~(HHSDC)~~ HELP DESK LEVEL III SUPPORT

RESOLUTION AND NOTIFICATION PROCEDURE

The WHD is responsible for coordinating with the ~~California Health and Human Services Agency Data Center (HHSDC)~~ Help Desk for any problems that cannot be resolved locally and are determined to be network or hardware related. The HHSDC Help Desk is required to follow the specific procedures identified in *Table 5-1: HHSDC Resolution and Notification Procedures* when a problem prioritized as “*Rush*” has been received from the WHD:

Table 5-1: HHSDC Resolution and Notification Procedures

If	Priority	Type	Then
WHD unable to resolve	Rush	Phone	Priority Rush – WHD <i>calls</i> HHSDC Help Desk immediately. WHD will provide the following: <ul style="list-style-type: none"> WHD Analyst Name WHD Analyst Phone Number Remedy Ticket ID Number Description of problem Error Message Expected Result
If	Action		
Resolve Yes	<ul style="list-style-type: none"> HHSDC <i>calls</i> WHD to advise ticket has been resolved WHD enters resolution into Remedy WHD confirms resolution and <i>calls</i> CHD WHD <i>calls</i> CHD to provide resolution WHD closes ticket in Remedy 		